HOW TO ADD AN IN-KIND CONTRIBUTION

1. Go to In-Kind Contributions.
   Click Transactions and then In-Kind Contributions.

2. Search for the contributor by Last Name.
   Use the Search by Last Name or Entity Name box to see if the contributor’s name record already exists. If so, click on the name. If the name is not there, click Add Name.

3. Click Add Contribution.
   You are now on the contributor’s page that will include all in-kind contributions s/he made and any refunds that you may have issued to the contributor. Click the blue Add Contribution button to proceed.

4. Enter the details of the contribution and click Save.
   C-SMART will alert you if you leave out required information. Complete the fields as follows:
   - **Date Received**: Enter the date the campaign received the contribution. You may do this by entering the date in the field using the MM/DD/YYYY format or by selecting a date from the calendar that appears when you click on the blank field. If the contribution is a service, this is the last date in the disclosure period in which the service was provided.
   - **Amount**: Enter the dollar amount of the determined fair market value of the contribution.
   - **Contribution Type**: From the options available in the drop-down menu, select the appropriate contribution type that best explains the contribution (Expenses Paid, Property Given, or Services/Facilities).
   - **Exempt Code**: If the value of this contribution should not count against the expenditure limit, select the appropriate exempt category from the available options in the drop-down list. You must follow all rules for exempt expenditures, including receiving CFB
approval on your exempt expenditure methodology before you may disclose expenditures as exempt. Please see Chapter 3 (Spending Campaign Funds) of the Handbook for more information on exempt expenditures.

- **Purpose Code**: Select the purpose code from the available options in the drop-down list that most closely represents the purpose this contribution will serve. Please refer to the C-SMART Purpose Codes Guide for further information.

- **Explanation**: Enter a brief reason or explanation describing the contribution and/or its purpose.

- **Is this contributor in the Doing Business Database?**: If the contribution is greater than the Doing Business contribution limit for the office you are seeking or if the contribution pushes the contributor’s aggregate contribution total past the Doing Business limit, use the link to check if the person is listed in the database. Use the drop-down menu to indicate if the person is listed in the database.

- **Runoff/Rerun**: Check this indicator if the contribution was received for an anticipated runoff or court-ordered rerun election. You can accept contributions for runoffs only if the Campaign Finance Board has announced that a runoff is reasonably anticipated. See the Runoff Guidance Document for more information.

- **Committee**: Select the committee receiving this contribution from the list of committees available in the drop-down list. C-SMART will automatically default to your principal committee. You may select a different committee if the default does not apply to this transaction.

- **Event**: If the contribution was collected at a fundraising event, use the drop-down list to select that event. If the event does not appear in the drop-down list, you need to add the event in Fundraising Events.

- **Intermediary Name**: If this contribution was intermediated, select the name of the intermediary from the drop-down list. If the name of the intermediary does not appear in the drop-down list, select Add Intermediary to add a name record for the intermediary.

- **Notes**: Enter any additional notes related to this transaction. Please be aware that this same note field appears on both the main transaction and any associated transactions. If you make changes on any one of the associated transactions, those changes will be reflected in those associated transactions as well as the main transaction.

*Important: Information entered and saved in this field is intended for use by the campaign only and is not part of any data submitted to the Campaign Finance Board during any submission process.*

**CANDIDATE SERVICES TIP(S):**

- ✓ Upon clicking Save, if a warning message pops up, read it. It might notify you of a potential compliance issue that you need to address immediately.
- ✓ Use the tab key to navigate through the fields so that you don’t miss one.
5. Your transaction has been successfully saved. At this point, C-SMART will go back to the contributor’s In-Kind Contributions page and you will see that the **Totals** box is updated to account for the saved transaction, and the list of in-kind contributions on the bottom of the screen includes the contribution you just saved.

**CANDIDATE SERVICES TIP(S):**

- **Notice that the transaction now has a Transaction ID.** Write this number on the backup documentation ([In-Kind Contribution Form](#), proof of fair market value, etc.) for audit and recordkeeping purposes.
HOW TO EDIT AN IN-KIND CONTRIBUTION

1. Click Edit.
   From the contributor’s In-Kind Contributions page, click the Gear icon and then Edit OR use the Search Transaction ID bar if you know the Transaction ID and click the Edit button.

   ![Edit Button Image]

   OR

2. Update and click Save.
   Modify, add, or remove the applicable fields and then click Save.

   CANDIDATE SERVICES TIP(S):
   ✓ Notice that the timestamp will be updated to reflect who made the modification to the transaction and when.

   ![Edit Details Image]
3. The contribution has been successfully edited.

HOW TO DELETE AN IN-KIND CONTRIBUTION

1. Click on the Transaction ID or Search by Transaction ID.
   From the contributor’s In-Kind Contributions page, click on the Transaction ID for the transaction you wish to delete OR use the Search Transaction ID bar if you know the Transaction ID.

OR

2. Click Delete.
   Once you have reviewed the saved transaction and are positive that this was saved in error and did not actually occur, you can click the Delete button.
3. The contribution has been successfully deleted.

**CANDIDATE SERVICES TIP(S):**

- In most cases, you should delete a transaction only if you are sure it was entered or saved in error and did not actually occur.

HOW TO ADD AN IN-KIND CONTRIBUTION REFUND

1. **Click on the Transaction ID or Search by Transaction ID.**

   From the contributor’s In-Kind Contributions page, click on the Transaction ID for the transaction for which you wish to add a refund OR use the Search Transaction ID bar if you know the Transaction ID.

   ![In-Kind Contributions screen](image)

   OR

   ![Search Transaction ID](image)

2. **Click Add Refund.**

   Click the blue Add Refund button to proceed.
3. **Enter the details of the refund and click Save.**
   C-SMART will alert you if you leave out required information. Complete the fields as follows:
   - **Refund Date:** Enter the date the contribution was refunded. You may do this by entering the date in the field using the MM/DD/YYYY format or by selecting a date from the calendar that appears when you click on the blank field.
   - **Amount:** Enter the amount refunded.
   - **Refund Type:** Select the refund type from the options available in the drop-down list:
     - Select Refund if you are issuing a certified/bank check to refund some or all of the original contribution.
     - Select Other under other circumstances, if applicable.
   - **Explanation:** If you enter Other as the refund type, you will need to enter a reason for the refund.
   - **Check Number:** Enter the refund check number.
   - **Bank Account:** From the drop-down menu of bank accounts, select the account from which the refund was drawn. C-SMART will automatically default to your primary bank account. You may select a different bank account if the default does not apply to this transaction.
   - **Notes:** Enter any additional notes related to this transaction. Please be aware that this same note field appears on both the main transaction and any associated transactions. If you make changes on any one of the associated transactions, those changes will be reflected in those associated transactions as well as the main transaction.

   *Important: Information entered and saved in this field is intended for use by the campaign only and is not part of any data submitted to the Campaign Finance Board during any submission process.*

4. **Your transaction has been successfully saved.**
   At this point, C-SMART will go back to the In-Kind Contribution Details page and you will see that the **Totals** box is updated to account for the saved transaction, and the list of refunds on the bottom of the screen includes the refund you just saved.
CANDIDATE SERVICES TIP(S):

✓ Notice that the transaction now has a **Transaction ID**. Write this number on the copy of the bank or certified refund check.

HOW TO EDIT AN IN-KIND CONTRIBUTION REFUND

1. **Click Edit.**
   
   From the transaction’s **In-Kind Contribution Details** page, click the **Gear** icon and then **Edit** OR use the **Search Transaction ID** bar if you know the Transaction ID and click the **Edit** button.
4. **Update and click Save.**
Modify, add, or remove the applicable fields and then click **Save**.

**CANDIDATE SERVICES TIP(S):**
- ✓ *Notice that the timestamp will be updated to reflect who made the modification to the transaction and when.*
- ✓ *If your refund check was voided, click Void Check and enter the date voided. Voiding the check will void the In-Kind Contribution Refund transaction. If you have to issue the contributor a new refund check, you must create a new In-Kind Contribution Refund transaction.*

5. **The refund has been successfully edited.**
HOW TO DELETE AN IN-KIND CONTRIBUTION REFUND

1. Click on the Transaction ID or Search by Transaction ID.
   From the transaction’s In-Kind Contribution Details page, click on the Transaction ID for the refund you wish to delete OR use the Search Transaction ID bar if you know the Transaction ID.

OR

2. Click Delete.
   Once you have reviewed the saved transaction and are positive that this was saved in error and did not actually occur, you can click the Delete button.

3. The refund has been successfully deleted.

CANDIDATE SERVICES TIP(S):

- In most cases, you should delete a transaction only if you are sure it was entered or saved in error and did not actually occur.
HOW TO ADD IN-KIND CONTRIBUTION DOCUMENTATION

1. **Click on the Transaction ID or search by Transaction ID.**
   From the contributor’s In-Kind Contributions page, click on the in-kind contribution’s transaction ID. Or, if you already know the transaction ID, use the Search Name or Transaction ID bar.

   ![In-Kind Contributions Page](image)

   OR

2. **Click Add Document.**
   Click the blue Add Document button to proceed.

   ![Add Document Button](image)
CANDIDATE SERVICES TIP(S):

✓ As a shortcut, you can click on the blue gear icon corresponding to the transaction ID on the contributor’s In-Kind Contributions page and then click Add Document.

3. Enter the details of the document and click Save.
   - Select a PDF document to upload: Click Upload PDF to select the file from your computer or other device. The file size cannot exceed 4 MB. Once you select the file, it will be displayed in the PDF Preview field.
   - Select page(s) and type of document:
     o Enter the page number(s) of the PDF that is/are associated with the transaction. You can use a dash to select a page range (3-4) or a comma to select non-consecutive page numbers (1, 3). You also can choose Select All Pages if all pages of the PDF correspond to the transaction.
     o From the drop-down list for Type, indicate whether the documentation is an in-kind contribution form or supporting documentation. If your PDF contains more than one type of documentation, you can upload them together under a single document type.
   - Save: Click Save to store the document in C-SMART and link it to the transaction.

![Add Documentation](image)

CANDIDATE SERVICES TIP(S):

✓ Even if a document is stored in C-SMART and linked to a transaction, it is not submitted to the CFB when uploaded. The documentation will be submitted when the underlying transaction is submitted in a disclosure statement or an amendment.

4. The document has been successfully saved.
   At this point, C-SMART will go back to the transaction’s page and you will see that the transaction will show that it has in-kind contribution documentation linked to it.
HOW TO VIEW IN-KIND CONTRIBUTION DOCUMENTATION

1. Click on the Transaction ID or search by Transaction ID.
   From the contributor’s In-Kind Contributions page, click on the in-kind contribution’s transaction ID. Or, if you already know the transaction ID, use the Search Name or Transaction ID bar.

![In-Kind Contributions screenshot]

**OR**

2. Click View PDF.
   In the Documentation section, click View PDF.

![Documentation screenshot]

HOW TO DELETE IN-KIND CONTRIBUTION DOCUMENTATION

1. Click on the Transaction ID or search by Transaction ID.
   From the contributor’s In-Kind Contributions page, click on the in-kind contribution’s transaction ID. Or, if you already know the transaction ID, use the Search Name or Transaction ID bar.
2. **Click Delete.**

Once you have reviewed the saved document and are positive that this was added in error and should not be linked to the transaction, you can click the **Delete** button in the **Documentation** section.

3. **The document has been successfully deleted.**

**CANDIDATE SERVICES TIP(S):**

- Once in-kind contribution documentation has been submitted to the CFB, you will no longer be able to delete it.